



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 9/8/2004

GAIN Report Number: TU4032

Turkey

Fresh Deciduous Fruit

Annual Report

2004

Approved by:

Jim Higgiston, Agricultural Counselor
U.S. Embassy

Prepared by:

Unal Sarigedik, Agricultural Specialist

Report Highlights:

Turkish apple and pear production is estimated to decrease by about 10 percent in MY 2004, while no change is estimated for fresh table grape production from the previous year. Exports of apples, pears and table grapes remain only a small proportion of the production even though Turkey produces large quantities. Middle Eastern and European markets are the primary export destinations.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Ankara [TU1]
[TU]

Table of Contents

Executive Summary 3
Production 4
Consumption..... 4
Trade..... 5
Stocks 5
Policy 5
Marketing 5

Executive Summary

In MY 2004, Turkey's apple and pear production is estimated to be ten percent lower compared to the previous year. This is because of the frosts in early April, which affected the production of some of the horticultural crops in the country. However, MY 2004 table grape production estimates are about at the same level as they were in the previous year.

The quality of apple, pear, and table grape production has improved in recent years through use of better seedlings and production techniques in Turkey.

Turkey consumes domestically most of the (about 90 percent) deciduous fruit production. Only small proportions of the production (five percent or less) are exported. Middle East and European markets are the primary destinations. Russia is also a significant market especially for fresh table grapes.

To protect Turkish growers, a 60.3 percent duty is applied on fresh apple and pear imports and a 54.9 percent import duty on fresh table grape imports from all origins.

The GOT does not support pear and grape exports. However, the GOT supports apple exports at USD 40 per MT. This support was announced late and only for three months (March through May). Payments will not be made as cash to exporters, instead; exporters may use it as part of their payments to the government as taxes, social security and other payments.

(Note: The exchange rate for USD 1.00 is currently around TL 1,500,000 compared to TL 1,380,000 a year ago. The rate of inflation for the same period is around ten percent.)

Production

Winter weather conditions were good for fresh deciduous fruit production. Frosts in early April, which caused damages to production of some horticultural crops in parts of the country, also caused some damages to apple and pear production. Both apple and pear production is estimated to be about 10 percent lower than last year. Fresh table grape production, however, is estimated to be about the same as it was last year. Rains, which continue primarily in the Marmara and Black Sea Regions and northern parts of the Central and Eastern Anatolia Regions, may further affect the production and lower both the quantity and quality.

Apples constitute the majority of the Turkey's deciduous fruit crops and are grown in most parts of the country. However, the production is more concentrated around Isparta, Karaman, Nigde, Antalya, Eregli, and Denizli Provinces. About one half of the apples grown in Turkey are Red Delicious (Starking) and about 30 percent are Golden Delicious apples. Amasya variety is the primary local variety, which constitutes about ten percent of the total production. The remaining ten percent is comprised of all other varieties. Granny Smith, Fuji, Gala, Jonagold, and Braeburn, are developing fast in Turkey. In addition to a few large commercial farms, smaller new farms (with a size of about 10 hectares) are also being established in recent years. All of these farms are being established with better quality seedlings and higher technology, including intensive plantings on dwarfing and intermediate vigor rootstocks.

Pears are another important deciduous fruit and there are many different varieties that are harvested and marketed in summer or winter. However, the most common varieties grown in Turkey are Santa Maria, Cascia, Williams, Ankara, and Deveci. Similar to apples, pears are also grown throughout the country, but more concentrated around Bursa, Yalova, Antalya, Ankara, Konya, and Burdur Provinces.

Grapes are very important for Turkey since they are consumed fresh, dried as raisins (for both domestic and exports markets) and also used to produce raki (a largely consumed local alcoholic drink) and wine (which is growing fast in recent years). This report, however, provides data only for fresh table grapes. Table grapes are grown throughout the country. Almost every local region has its own variety. Sultana grapes, which are used primarily to produce raisins, are also being consumed as fresh table grapes (estimated as ten percent of total sultana production). The details of this information are presented in the Dried Fruit Annual report (TU 4012). In recent years, the production of higher quality table grapes through the use of improved production techniques in orchards has been increasing. The production data on fresh table grapes are not available in Turkey. The only production data available is total grape production. Table grape production is assumed to be one half of the total grape production by the industry sources. Total grape production was rather stable during the recent years, which explains why production estimates remain at 1.75 million tons.

Consumption

Turkey is estimated to consume about 90 percent of the apples fresh, process five percent or less, export about one percent and the remainder is losses. The apple harvest starts in September and prices vary a lot due to the supply and location. Apple prices are around TL 2,000,000 (or about USD 1.33) per kilogram in the local grocery stores in Ankara.

Turkey is also estimated to consume about 90 percent of pears fresh, process less than five percent, three to five percent is exported and the remainder is losses. Pear prices are around TL 2,250,000 (or about USD 1.50) per kilogram.

About one half of Turkey's grape production is consumed as table grapes, 35 percent is dried, and 15 percent is processed, primarily for wine. Of that one half, which is consumed as table grapes, 90 percent is consumed as fresh, about 5 percent is exported and the remainder is calculated as losses. PSD consumption data represents fresh table grape consumption plus losses. Currently, retail prices vary from TL 1,500,000 (or about USD 1.00) per kilogram to TL 2,500,000 (or about USD 1.67) per kilogram depending upon the variety and location in the grocery markets in Ankara.

Trade

Turkey exports only a small amount of its deciduous fruit production, even though Europe, Russia, and Middle East are significant markets. This may be attributed to the cost of production, insufficient standardization of the fruits, and shortage of the varieties desired by importing countries. The primary destinations for the most parts of the Turkey's deciduous fruit exports are the Middle Eastern and the European markets. Saudi Arabia is the leader for apple and pear exports and Russia is the leader country for fresh table grape exports. Official trade data are available through June 2004.

Stocks

Almost all of apples, pears, and grapes are stored in climate-controlled storage facilities and sold throughout the year.

Policy

The GOT does not provide any price support for pears or table grapes. The GOT announced in the Official Gazette on May 23, 2004, USD 40 per MT support for apple exports made in between March 1, 2004 and May 31, 2004. The support, however, will not be made as direct payment to exporters, in stead; it will be accounted against exporters tax, social security or other payments, such as electricity, to the government.

On January 1, 2004 the GOT reduced the duties for imports of fresh apples, pears, and table grapes. The new and old duties follow:

Product	Tariff Code	New Duty	Old Duty	Affective Date
Fresh Apples	0808.10	60.3	60.9	January 1, 2004
Fresh Pears	0808.20.10 & 0808.20.50	60.3	60.9	January 1, 2004
Fresh Table Grapes	0806.10	54.9	55.5	January 1, 2004

Marketing

Fresh deciduous fruits are sold domestically or exported through private traders and specialized marketing cooperatives.

Statistical Tables

PSD Table for Apples

Turkey Apples, Fresh							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		07/2002		07/2003		07/2004	MM/YYYY
Area Planted	0	0	0	0	0	0	(HA)
Area Harvested	0	0	0	0	0	0	(HA)
Bearing Trees	32600	32600	32700	32700	0	32700	(1000 TREES)
Non-Bearing Trees	6200	6200	6300	6300	0	6300	(1000 TREES)
Total Trees	38800	38800	39000	39000	0	39000	(1000 TREES)
Commercial Production	2200000	2200000	2500000	2600000	0	2300000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	2200000	2200000	2500000	2600000	0	2300000	(MT)
TOTAL Imports	1719	2820	1500	2540	0	3000	(MT)
TOTAL SUPPLY	2201719	2202820	2501500	2602540	0	2303000	(MT)
Domestic Fresh Consump	2074634	2075620	2356500	2455610	0	2178000	(MT)
Exports, Fresh Only	17085	17200	20000	21930	0	15000	(MT)
For Processing	110000	110000	125000	125000	0	110000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	2201719	2202820	2501500	2602540	0	2303000	(MT)

Export Trade Matrix for Apples

Export Trade Matrix

Country Turkey

Commodity Apples, Fresh

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2003	Jan. - June	2004
U.S.		U.S.	
Others		Others	
Saudi Arabia	9170	Jordan	1857
Egypt	1856	Saudi Arabia	1627
Jordan	1457	Iraq	1170
Libya	538	United Arab Em.	442
Iraq	521	Egypt	331
Greece	381	Romania	286
Kuwait	313	Greece	277
Oman	143	Sudan	149
Germany	142	Germany	45
Romania	88	Kuwait	31
Total for Others	14609		6215
Others not Listed	4833		1794
Grand Total	19442		8009

Import Trade Matrix for Apples

Import Trade Matrix

Country Turkey

Commodity Apples, Fresh

Time Period Units:
 Imports for: Jan. - June
 U.S. U.S.
 Others Others

Chile	1693	Chile	1650
Italy	828	Italy	225
France	180	France	123
Argentina	96	Greece	15
Belgium	32		
Jordan	22		
Saudi Arabia	13		

Total for Others 2864 2013
 Others not Listed
 Grand Total 2866 2013

PSD Table for Pears

Turkey Pears, Fresh							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		07/2002		07/2003		07/2004	MM/YYYY
Area Planted	0	0	0	0	0	0	(HA)
Area Harvested	0	0	0	0	0	0	(HA)
Bearing Trees	10500	10500	10500	10500	0	10500	(1000 TREES)
Non-Bearing Trees	1950	1950	1950	1950	0	2000	(1000 TREES)
Total Trees	12450	12450	12450	12450	0	12500	(1000 TREES)
Commercial Production	340000	340000	340000	370000	0	330000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	340000	340000	340000	370000	0	330000	(MT)
TOTAL Imports	85	85	100	220	0	250	(MT)
TOTAL SUPPLY	340085	340085	340100	370220	0	330250	(MT)
Domestic Fresh Consump	303499	303485	303100	336790	0	300250	(MT)
Exports, Fresh Only	19586	19600	20000	16430	0	15000	(MT)
For Processing	17000	17000	17000	17000	0	15000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	340085	340085	340100	370220	0	330250	(MT)

Export Trade Matrix for Pears

Export Trade Matrix

Country Turkey

Commodity Pears, Fresh

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2003	Jan. - June	2004
U.S.		U.S.	
Others		Others	
Saudi Arabia	4040	Germany	363
Germany	3346	Romania	234
Greece	1794	Netherlands	212
Netherlands	1221	Albania	114
Russia	1071	Saudi Arabia	106
Yugoslavia	631	Greece	93
Romania	570	Russia	89
United Arab Em.	436	Yugoslavia	56
Austria	349	Israel	49
Israel	325	United Kingdom	38
Total for Others	13783		1354
Others not Listed	2802		39
Grand Total	16585		1393

Import Trade Matrix for Pears

Import Trade Matrix

Country Turkey

Commodity Pears, Fresh

Time Period Units:
 Imports for: Jan. - June
 U.S. U.S.

Others		Others	
Argentina	46	Chile	115
Chile	30	South Africa	38
Croatia	17	Argentina	33
		Israel	15

Total for Others 93 201
 Others not Listed
 Grand Total 97 201

PSD Table for Fresh Table Grapes

Turkey Grapes, Table, Fresh							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Area Planted	260000	260000	260000	260000	0	260000	(HA)
Area Harvested	260000	260000	260000	260000	0	260000	(HA)
Commercial Production	1750000	1750000	1750000	1750000	0	1750000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	1750000	1750000	1750000	1750000	0	1750000	(MT)
TOTAL Imports	129	40	100	110	0	100	(MT)
TOTAL SUPPLY	1750129	1750040	1750100	1750110	0	1750100	(MT)
Domestic Fresh Consump	1584490	1563810	1582600	1562610	0	1562600	(MT)
Exports, Fresh Only	78139	98730	80000	100000	0	100000	(MT)
For Processing	87500	87500	87500	87500	0	87500	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	1750129	1750040	1750100	1750110	0	1750100	(MT)

Export Trade Matrix for Fresh Table Grapes

Export Trade Matrix

Country Turkey

Commodity Grapes, Table, Fresh

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2003	Jan. - June	2004
U.S.		U.S.	
Others		Others	
Russia	53032	Russia	567
Germany	15485	Romania	122
Austria	8205	Saudi Arabia	40
Saudi Arabia	7046	Netherlands	31
Netherlands	6243	Germany	31
Romania	1412	Kuwait	19
Kuwait	1205	Iraq	14
United Kingdom	1089	United Kingdom	2
Latvia	988	Belgium	2
Poland	869	Gabon	1
Total for Others	95574		829
Others not Listed	3155		
Grand Total	98729		829

Import Trade Matrix for Fresh Table Grapes

Import Trade Matrix

Country Turkey

Commodity Grapes, Table, Fresh

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2003	Jan. - June	2004
U.S.		U.S.	
Others		Others	
South Africa	30	South Africa	54
Chile	7	Chile	53
Netherlands	5		
Total for Others	42		107
Others not Listed			
Grand Total	42		107